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FROM: Market Information / Bruce Neidle

SUBJECT: INTEGRATED WEEKLY NIELSEN REPORT-WEEK ENDING 7/13/96

ALL OUTLETS COMBINED

- PM's share declined -0.1 point week-to-week to 49.8%, with Marlboro's slight gain offset by PM Discount losses.
  - After establishing record levels in the past three weeks, PM's share in drug stores and mass merchandisers declined -0.2 and -2.3 points versus week-ago to 51.3% and 59.0%, respectively.
- Marlboro's share increased slightly this week (+0.1 point) to 33.6% (from 33.6% last week due to rounding), with the gain concentrated in c-stores and supermarkets.
- OPB's share was unchanged this week at 9.0%.
- After three consecutive weekly gains, Basic's share of industry and share of category declined -0.1 point each to 4.8% and 18.3%, respectively.
- The Discount category trailed week-ago by -0.3 points to 26.2%, with Basic and RJR PL accounting for the majority of the loss.
  - RJR PL's share declined -0.1 point to 3.2%, its lowest level since w/e 12/30/95.
- Among the major competitive premium brands, Newport and Camel posted the largest week-to-week gains (+0.2 and +0.1 points, respectively).

CONVENIENCE STORES

- PM's share advanced +0.1 point this week to 50.6%, as Marlboro's gain more than offset OPB and Cambridge declines.
- Marlboro's share was up +0.3 points week-to-week to 35.7%, likely benefiting from continued MUBSS money-off support (incidence fell -3 points from last week's peak to 38% of c-stores).
- PM OPB's share declined -0.1 point versus week-ago to 7.9%, with B&H and Merit accounting for the loss.
- Basic's share was relatively stable this week at 4.9% (down from 5.0% last week due to rounding), while its share of the Discount category increased +0.2 points to 18.6%. Basic was likely influenced by continued money-off support from the MUBSS program (incidence was at 30% of c-stores for the third consecutive week).
- The Discount category declined -0.4 points versus week-ago to 26.5%. Among the major discount entries, GPC, Misty, Cambridge and RJR PL incurred the largest week-to-week losses.
- Among the competitive premium products, Newport, Camel and Vantage posted the only weekly share gains (of at least +0.05 points).
  - After building to year-to-date high levels in the past two weeks, Camel's money-off incidence fell -4 points to 41% of c-stores.

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Source: https://www.industrydocuments.ucsf.edu/docs/yzmm0004